



## Watch rules for Saved Reports

Watch Rules allow users to monitor reports and be notified via e-mail when data in the reports meet certain criteria. When criteria are met, the user may be e-mailed a notification and a copy of the report itself, if desired. To configure Watch Rules and proper notification, you will:

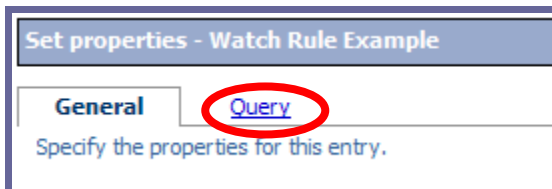
1. Enable the Report for Watch Rules
2. Run and Save the Report
3. Create the Watch Rules
4. Schedule the Report

Watch Rules may be enabled only on reports in your agency folder or your My Folders area. Open (State of Idaho Public Folders/Agency nnn or My Folders) by clicking on the folders tab where the report is stored.

To enable the report for Watch Rules, click the Set Properties icon next to the report.



Select the Query tab. If using Report Studio, select the Report tab.





**Set properties - Watch Rule Example**

[General](#) **[Query](#)**

Select the default options to use for this entry.

**Default action:**  
 View most recent report ▾

**Report options:**  
☐ Override the default values

**Formats:**  
 Default

**Languages:**  
 Default

**Prompt values:**  
 No values saved  
[Set...](#)  
☒ Prompt for values

**Run as the owner:**  
☐ GREGORY SCHENK-140

[Advanced options](#) ⤴

**Number of rows per Web page in HTML reports:**  
 20 ▾

☒ Enable selection-based interactivity in HTML reports  
☐ Enable alerts about new versions  
☒ Enable enhanced user features in saved output versions

OK Cancel

1. Under **Default action**: Make sure **View most recent report** is selected.
2. Click the **Advanced options** link.
3. Check these two check boxes:
  - Enable selection-based interactivity in HTML reports
  - Enable enhanced user features in saved output versions
4. Click **OK**

Under Actions Click the **Run with Options** icon next to the report

		<a href="#">Training Template</a>	October 15, 2008 3:40:31 PM	 <a href="#">More...</a>
		<a href="#">Watch Rule Example</a>	February 18, 2009 10:24:15 AM	 <a href="#">More...</a>



Under **Delivery**: Select **Save the Report** and then click **Run**

Run with options - Watch Rule Example Help X

Select how you want to run and receive your report.

**Format:**  
HTML

**Language:**  
English (United States)

**Delivery:**

☐ View the report now


☒ Save the report

☐ Print the report:


**Printer location:**  
 [Select a printer...](#)

☐ Send me the report by email

**Prompt values:**  
No values saved  
☒ Prompt for values

The report will take time to run, so click the Refresh  icon to refresh the screen  
**Note** the icons next to the report – these will change after the report runs.



Click the View the output versions icon  for this report  
Click the HTML link.



Formats



Right-click a numeric item, then click Alert Using New Watch Rule.

[Keep this version](#)

AGENCY CODE	FUND CODE	EXPENDITURE OBJECT CODE	GL AM
140	0001	4000	2,193
		5000	2,977
		6000	1
	<b>0001</b>		<b>5,172,316.99</b>
	0349	5000	31,126.27
	<b>0349</b>		<b>31,126.27</b>
	0480	4000	2,807,849.47
		5000	1,297,625.98
		6000	240,175.07
	<b>0480</b>		<b>4,345,650.52</b>
<b>140</b>			<b>9,549,093.78</b>
<b>Summary</b>			<b>9,549,093.78</b>

Drill Down
 Drill Up

Go To

Alert Using New Watch Rule...

In this example, you can:

Select a total that is associated with a query item (e.g., select an amount associated with an expenditure object).

Select a subtotal associated with a query item (e.g., select an amount associated with a fund code or agency code).



**Specify the rule - Alert Using New Watch Rule**

Specify the rule for the alert.

**Send an alert when the report 'Watch Rule Example' contains:**

GL AMOUNT > (greater than) ▼ 1321.5

**For the selected context:**

☒ 140

☒ 0001

☒ 6000

Cancel < Back Next > Finish

Click the down arrow next to the 'conditional expression' and select the condition for the watch rule.

For example, select whether the rule should be triggered when the numeric item is "greater than or equal" to a specific value.

Specify the value for the condition. (1321.50)

Select the context or query item to which the rule applies (e.g., which query item is greater than or equal to 1321.50)

In this example, if all three check boxes are checked, the rule will apply to the row which contains data for Agency 140, Fund 0001 and Expenditure Object 6000

If only 140 and 0001 were checked, the rule would apply to any row which contained data for Agency 140 and Fund 0001.

NOTE: Multiple rules based on different conditions and/or contexts can be set up on the same report.

Click Next

**Specify the alert type - Alert Using New Watch Rule**

Specify how you want to be alerted when the rule is satisfied.

**Alert type:**

Select at least one alert type.

☐ Send the report by email [Edit the options...](#)

MARY EVERILL-140

☐ Publish a news item [Edit the options...](#)

...> Report: 'Watch Rule Example' - 'GL AMOUNT' > 1321.5

Cancel < Back Next > Finish

Select **Send the report by email**.

To edit the email options, click **Edit the options**.



You can

- Edit the e-mail subject line (Report: General Fund Cap Outlay >=1321.50)
- Add an e-mail message \_ Attached is the report
- Choose to attach the report

Click **OK**

Specify the alert type – **Alert Using the New Watch Rule**

Alert Type select **Send the report by email**

Click Next

Specify a name (and description if desired) of the Watch Item, and then save it in My Watch Items.

Click **Finish**

Click **Return** 

Close HTML window and schedule the report as you normally would.

Select **Override the default values**.

Verify that only HTML is selected in the Formats: section and **Save the Report** is selected in the Delivery: section.

If necessary, select these settings and click **OK**.

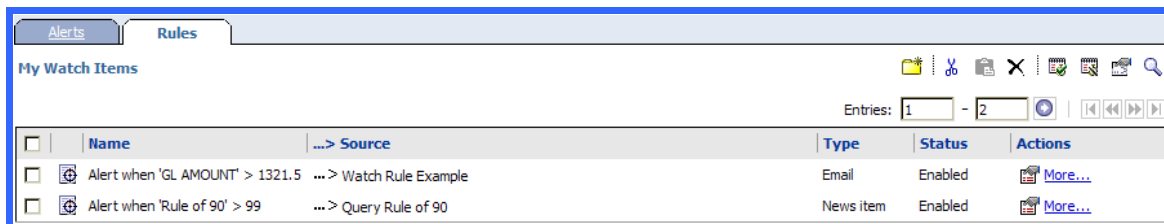
Manage your saved watch rules from the My Watch Items link in the toolbar.



Select the **Rules** tab



To edit a watch item, click its **Set Properties** icon.



Make your change and click **OK**



Set properties - Alert when 'GL AMOUNT' > 1321.5

Help

General

Rule

Permissions

Specify the rule for the alert and the alert type you want to send. You can disable the rule without losing any of its details. The rule does not run while it is disabled.

☐ Disable the rule

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**Rule**

Send an alert when the report 'Watch Rule Example' contains:

GL AMOUNT > (greater than) 1321.5

**For the selected context:**

☒ 140

☒ 0001

☒ 6000

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**Alert type**

Select at least one alert type.

☒ Send the report by email [Edit the options...](#)

MARY EVERILL-140

☐ Publish a news item [Edit the options...](#)

...> Report: 'Watch Rule Example' - 'GL AMOUNT' > 1321.5

OK

Cancel